



EquineForLife

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# USER MANUAL

## Table of Contents:

<u>Getting Started</u>	3
<u>Profile</u>	4
Update Contact Info	
Change Password	
Payments	
<u>Home</u>	5
Announcement Box	
Last 30 Days Summary	
<u>Setup</u>	6-12
Participants	
Staff	
Volunteers	
Horses	
Categories	
Programs	
<u>Sessions</u>	13-14
Enter new session	
Edit existing session	
<u>Reporting</u>	15-16
<u>Contact</u>	17
<u>Help</u>	18
Frequently Asked Questions	
User Manual	
User Agreement	

## Getting Started

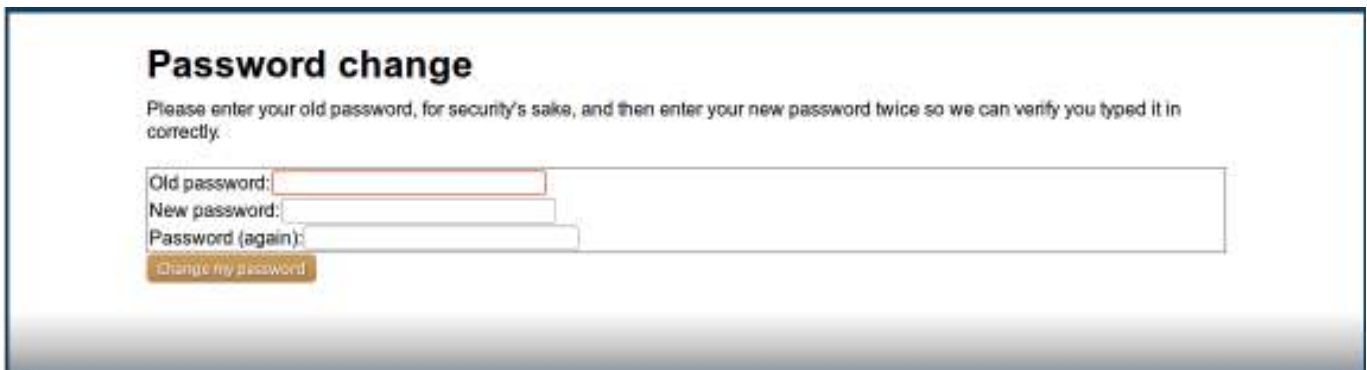
Welcome to Equine For Life! We are excited to provide you with a cutting edge data tracking service for your therapeutic horse-back riding program! We hope you enjoy this service and find it both user-friendly and efficient. If at any time you are unsatisfied with the system or have questions comments or suggestions, please contact [admin@equineforlife.com](mailto:admin@equineforlife.com). Because we are constantly working on new improvements and updates, including added features, we welcome all suggestions you might have on how to make the system better, more flexible and customized specifically for therapeutic riding programs!

If this is your first time logging in to Equine For Life, you will need to update your profile. You can do this by clicking on the "profile" tab on the top menu bar. When on the profile page, update the following information:

- Contact Name
- Phone Number
- Address
- Name of your organization
- Email address

## Profile

The profile page is also where you will update and/or change your password. Remember, passwords should never be given out to other people and should not be written down or stored in locations where others could find them. Choose passwords that you can remember but cannot be easily guessed by others. A good example of a password is one that uses both alpha and numerical characters. To change your password, click on the "Change Password" button on the top left corner of the profile page. You will then be prompted to enter a new password. Equine For Life does not store user passwords. If you forget your password, click on the "reset password" button on the login screen. A message will be sent to the email address entered on your profile page with instructions on setting a new password.



**Password change**

Please enter your old password, for security's sake, and then enter your new password twice so we can verify you typed it in correctly.

Old password:

New password:

Password (again):

[Change my password](#)

On the profile page, you can also change your payment status. By clicking on "payments", you can subscribe or unsubscribe to automatic monthly payments.

## Home

The home page is where you will automatically come to when first logging in to the program. The items shown on this page are informational and are designed to give you a quick glimpse or summary at a glance of your program.



### **30 Day Summary:**

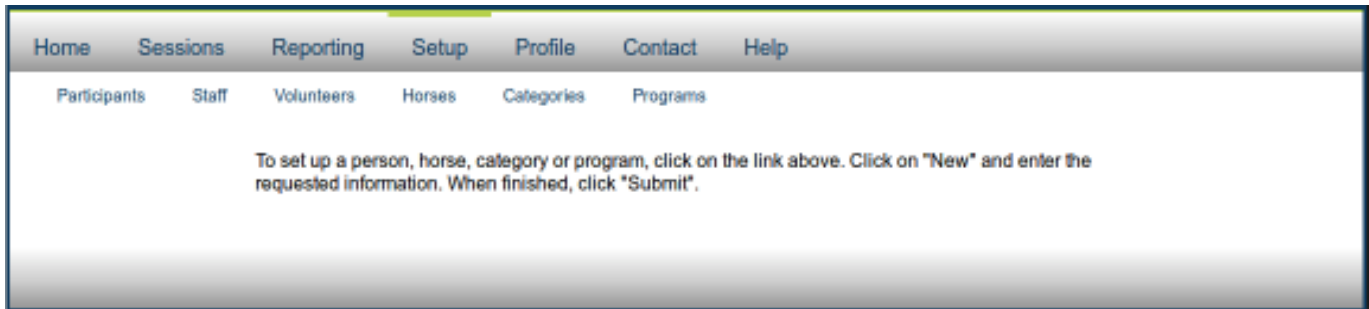
The pie charts show a summary of activity for the last 30 days. As you enter new information in the system, the 30 day summary will update to include your entries. Please note, these graphs are informational only and are not meant for reporting purposes.

### **Announcements:**

The announcement box will be used by the administrators of Equine For Life to post memos and updates for you. This is where we will notify you of any scheduled system down time for maintenance and updates, recent changes that you will notice, and any other information that we feel needs to be passed along to our members. Simply click on any of the messages to read its content.

## Setup

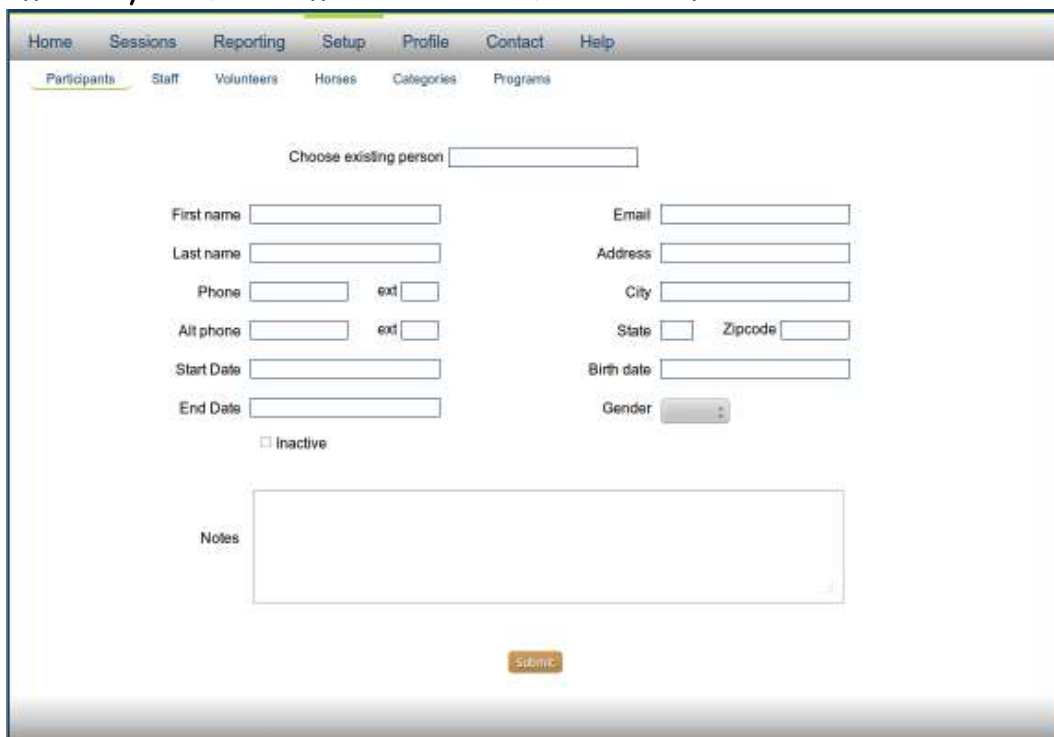
To setup participants, staff, volunteers, horses, categories and programs, click on the "setup" tab on the top menu bar.



The screenshot shows a web application's top menu bar. The 'Setup' tab is highlighted with a green underline. Below the main menu bar, there is a sub-menu bar with links for 'Participants', 'Staff', 'Volunteers', 'Horses', 'Categories', and 'Programs'. Below these links, a text instruction reads: 'To set up a person, horse, category or program, click on the link above. Click on "New" and enter the requested information. When finished, click "Submit".'

### **Participants:**

To enter a new participant, click on the "participants" tab and then "Enter New Participant". You can then enter all of the information regarding the participant, including important notes. If the participant you are entering has already been entered in a different area, type their name in the "choose existing person" box to select their record. An example of this situation would be if someone is already set up as a volunteer for your program, but is now also enrolling as a participant rider. When you are finished entering all of the information, click submit to save the record.



The screenshot shows the 'Participants' setup form. At the top, the 'Participants' tab is highlighted in the sub-menu bar. The form includes a 'Choose existing person' search box. Below this are two columns of input fields: 'First name', 'Last name', 'Phone' (with an 'ext' field), 'Alt phone' (with an 'ext' field), 'Start Date', 'End Date', 'Email', 'Address', 'City', 'State', 'Zipcode', 'Birth date', and 'Gender'. There is an 'Inactive' checkbox. At the bottom, there is a large 'Notes' text area and a 'submit' button.

To edit an existing participant, enter the name in boxes provided. The list of participants will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a participant inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

First Name	Last Name	Email	Phone
Participant	Eight	8@www.com	000-000-0000
Participant	Five	5@www.com	123-123-1234
Participant	Four	4@www.com	123-123-1234
Participant	Nine	9@www.com	123-456-7654
Participant	One	1@www.com	222-333-4444
Participant	Seven	7@www.com	111-111-1111
Participant	Six	6@www.com	555-545-5345
Participant	Ten	10@www.com	654-654-6543
Participant	Three	3@www.com	098-709-8700
Participant	Two	2@www.com	333-222-1111

## Staff:

To enter a new staff member, click on the "staff" tab and then "Enter New staff". You can then enter all of the information regarding the staff member, including important notes. If the person you are entering has already been entered in a different area, type their name in the "choose existing person" box to select their record. An example of this situation would be if someone is already set up as a volunteer for your program, but has just been hired as a new staff member. When you are finished entering all of the information, click submit to save the record.

Home Sessions Reporting Setup Profile Contact Help

Participants **Staff** Volunteers Horses Categories Programs

Enter New staff

Existing Staff Data

	First Name	Last Name *	Email	Phone
<input type="button" value="Reset"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="edit"/>	Jane	Doe	jane@www.com	123-456-7890
<input type="button" value="edit"/>	Staff	Five	Five@www.com	999-888-7777
<input type="button" value="edit"/>	Staff	Four	Four@www.com	123-456-7890
<input type="button" value="edit"/>	Staff	One	One@www.com	343-434-3434
<input type="button" value="edit"/>	Staff	Seven	Seven@www.com	987-987-9876
<input type="button" value="edit"/>	Staff	Six	Six@www.com	123-123-1231
<input type="button" value="edit"/>	Staff	Three	Three@www.com	555-444-3333
<input type="button" value="edit"/>	Staff	Two	Two@www.com	888-888-8888

Page 1 of 1 View 1 - 8 of 8

To edit existing staff member data, enter the name in boxes provided. The list of staff members will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a staff member inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

### Volunteers:

To enter a new volunteer, click on the "volunteers" tab and then "Enter New volunteer". You can then enter all of the information regarding the volunteer, including important notes. If the person you are entering has already been entered in a different area, type their name in the "choose existing person" box to select their record. An example of this situation would be if someone is already set up as a participant for your program, but will also be volunteering. When you are finished entering all of the information, click submit to save the record.



Home Sessions Reporting Setup Profile Contact Help

Participants Staff Volunteers Horses Categories Programs

Enter New Volunteer

Existing Volunteer Data

	First Name	Last Name *	Email	Phone
<input type="button" value="Reset"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="edit"/>	Volunteer	Five	Vol5@www.com	333-333-3333
<input type="button" value="edit"/>	Volunteer	Four	Vol4@www.com	567-567-5675
<input type="button" value="edit"/>	Participant	One	1@www.com	222-333-4444
<input type="button" value="edit"/>	Volunteer	One	Vol1@www.com	777-777-7777
<input type="button" value="edit"/>	Volunteer	Seven	Vol7@www.com	545-454-5454
<input type="button" value="edit"/>	Volunteer	Six	Vol6@www.com	888-777-8888
<input type="button" value="edit"/>	Volunteer	Three	Vol3@www.com	987-987-7777
<input type="button" value="edit"/>	Volunteer	Two	Vol2@www.com	444-444-4444

Page 1 of 1 View 1 - 8 of 8

To edit existing volunteer data, enter the name in boxes provided. The list of volunteers will automatically filter to anyone entered with that name. Simply click on the "edit" button next to the person you wish to edit. You may make a volunteer inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

### Horses:

To enter a new horse, click on the "Horses" tab and then "Enter New Horse". You can then enter all of the information regarding the horse, including important notes. When you are finished entering all of the information, click submit to save the record.

Home Sessions Reporting **Setup** Profile Contact Help

Participants Staff Volunteers **Horses** Categories Programs

Enter New Horse

Existing Horse Data

	Name *	Breed	Owner
<input type="button" value="Reset"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="edit"/>	Horse 2	Thoroughbred	Staff Two
<input type="button" value="edit"/>	Horse 4	Holsteiner	Volunteer Three
<input type="button" value="edit"/>	Horse 5	Holsteiner	Volunteer Six
<input type="button" value="edit"/>	Horse Three	Quarter Horse	Staff One
<input type="button" value="edit"/>	Horse1	Thoroughbred	Volunteer One
<input type="button" value="edit"/>	Horse6	Thoroughbred	Volunteer Two
<input type="button" value="edit"/>	Horse7	Quarter Horse	Staff Four
<input type="button" value="edit"/>	Pony1	Welsh Pony	Staff Three
<input type="button" value="edit"/>	Pony2	Shetland Pony	Staff Three

Page 1 of 1 View 1 - 9 of 9

To edit existing horse data, enter the name in boxes provided. The list of horses will automatically filter to any entered with that name. Simply click on the "edit" button next to the horse you wish to edit. You may make a horse inactive by marking the "inactive" button. After updating information on the record, click "submit" to save your changes.

Home Sessions Reporting **Setup** Profile Contact Help

Participants Staff Volunteers **Horses** Categories Programs

Name:

Breed:

Birth date:

Owner:

Phone:

## Categories:

To setup a new category, click on the "Categories" tab and then "Enter New Category". Enter the name of the category you wish to setup. When finished, click "submit" to save the record.

The screenshot shows the 'Existing Category Data' table. At the top, there is a green button labeled 'Enter New Category'. Below it, the table has a header row with 'Name' and a search input field. A 'Reset' button is located to the left of the search field. The table contains four rows of data:

	Name
<input type="button" value="edit"/>	Ground Care/Grooming
<input type="button" value="edit"/>	Indoor Lesson
<input type="button" value="edit"/>	Outdoor Lessons
<input type="button" value="edit"/>	Trail Ride

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and a 'View 1 - 4 of 4' indicator.

To edit an existing category, type the name in the box provided. The list of categories will automatically filter to any with the name you entered. Simply click on the "edit" button to the left of the category you wish to edit. You can then change the name of the category and choose whether it is visible or not. When finished, click "submit" to save the record.

The screenshot shows the 'New Category' form. It has a 'Name' input field and a 'Visible' checkbox. A 'Submit' button is located below the form.

New Category

Name:

Visible: ☐

## Programs:

To setup a new program, click on the "Programs" tab and then "Enter New Program". Enter the name of the program you wish to setup. When finished, click "submit" to save the record.

The screenshot shows the 'Programs' tab in a web application. At the top, there is a navigation bar with links: Home, Sessions, Reporting, Setup, Profile, Contact, and Help. Below this is a sub-navigation bar with links: Participants, Staff, Volunteers, Horses, Categories, and Programs (which is highlighted). A green button labeled 'Enter New Program' is visible. Below the button is a table titled 'Existing Program Data'. The table has a header row with a 'Name' column. Below the header, there are five rows of program data, each with an 'edit' button to its left. The programs listed are: Behavioral Program, Disabilities, Emotional, Riding Lessons, and Sports Therapy. At the bottom of the table, there is a pagination bar showing 'Page 1 of 1' and 'View 1 - 5 of 5'.

Existing Program Data	
	Name
<input type="button" value="edit"/>	Behavioral Program
<input type="button" value="edit"/>	Disabilities
<input type="button" value="edit"/>	Emotional
<input type="button" value="edit"/>	Riding Lessons
<input type="button" value="edit"/>	Sports Therapy

To edit an existing program, type the name in the box provided. The list of programs will automatically filter to any with the name you entered. Simply click on the "edit" button to the left of the program you wish to edit. You can then change the name of the program and choose whether it is visible or not. When finished, click "submit" to save the record.

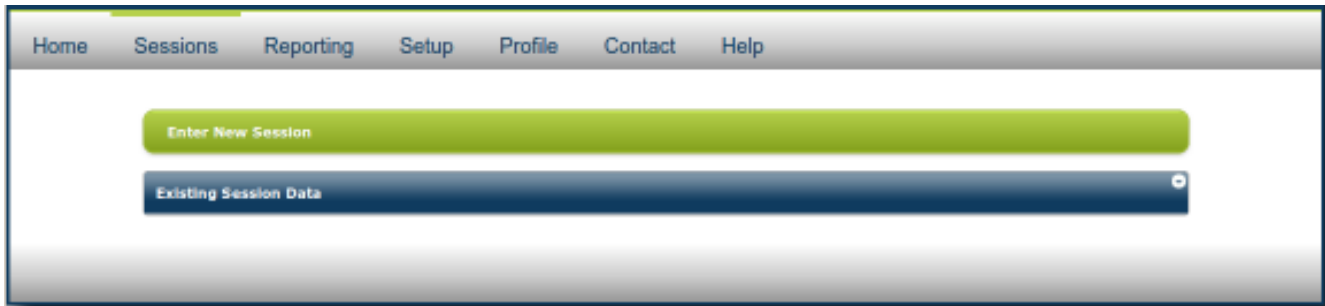
The screenshot shows the 'New Program' form in the 'Programs' tab. The form has a 'Name' field and a 'Visible' checkbox. Below the form is a 'Submit' button.

New Program

Name:

Visible: ☒

# Sessions



To enter session data, click on the "Sessions" tab on the top menu bar, then click on the "Enter New Session" button. Enter all relevant information.

- Choose the participant
- Enter the date of the session
- Enter the staff and volunteers (you may enter more than one of each)
- Choose the category and program
- Enter the horse (you may enter more than one horse)
- Select the payment status
- Enter the length of the session
- Type and comments in the notes box

When finished entering information about the session, click "submit" to save the record.

A screenshot of the session data entry form. The form is located below the navigation bar. It contains several input fields and a submit button. The fields are: Participant (a dropdown menu showing "(none)"), Date (a text box with "10/18/2011"), Staff (a text box), Volunteer (a text box), Category (a dropdown menu showing "Indoor Lesson"), Program (a dropdown menu showing "Disabilities"), Horse (a text box), Payment (radio buttons for "Paid", "Unpaid", and "No Charge", with "Unpaid" selected), Length (a text box), and Notes (a large text area). At the bottom center of the form is a yellow "Submit" button.

To edit information on an existing session, enter the participant name and date of the session in the boxes provided. The list of sessions will then automatically filter to that information. Click on the "edit" button next to the session you wish to change. You may then change any of the information entered for this session. When finished, click the "submit" button to save your changes.

[Home](#)
[Sessions](#)
[Reporting](#)
[Setup](#)
[Profile](#)
[Contact](#)
[Help](#)

Enter New Session

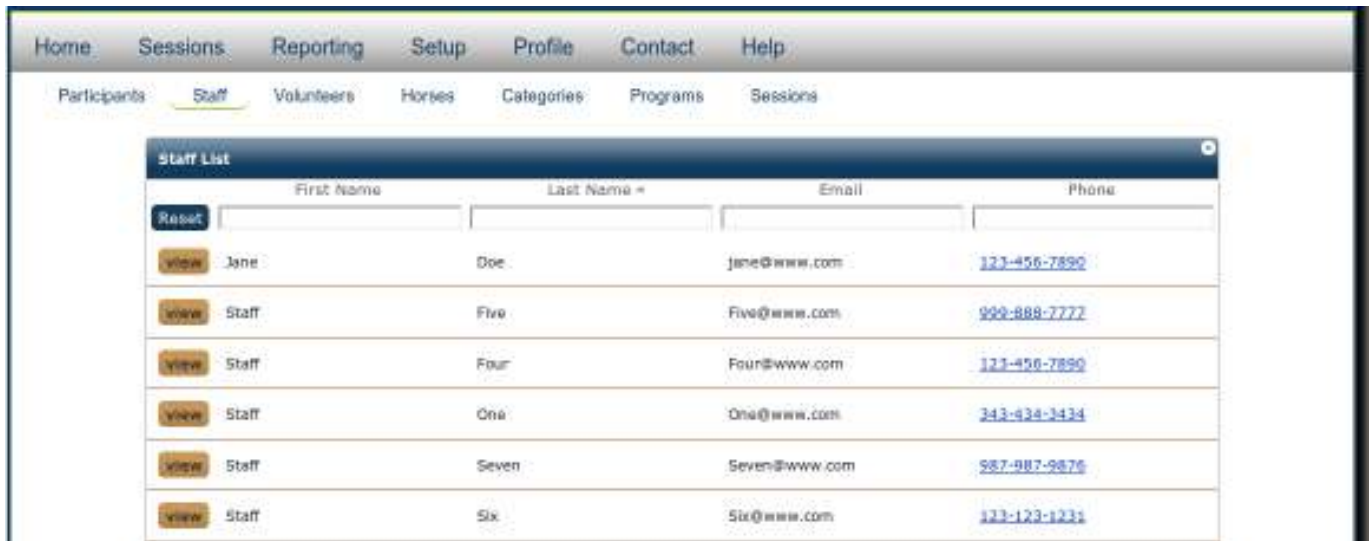
Existing Session Data

	Participant	Date	Paid	Program	Category
<a href="#">Reset</a>	<input type="text"/>	<input type="text"/>	<a href="#">All</a>	<a href="#">All</a>	<a href="#">All</a>
<a href="#">edit</a>	Participant Three	10/10/2011	Paid	Behavioral Program	Indoor Lesson
<a href="#">edit</a>	Participant Four	10/09/2011	Paid	Emotional	Ground Care/Grooming
<a href="#">edit</a>	Participant Eight	10/08/2011	Paid	Disabilities	Indoor Lesson
<a href="#">edit</a>	Participant Nine	10/07/2011	No Charge	Emotional	Trail Ride
<a href="#">edit</a>	Participant Five	10/06/2011	Paid	Disabilities	Trail Ride
<a href="#">edit</a>	Participant Eight	10/05/2011	Paid	Disabilities	Indoor Lesson
<a href="#">edit</a>	Participant Eight	10/04/2011	Paid	Emotional	Indoor Lesson
<a href="#">edit</a>	Participant Nine	10/03/2011	No Charge	Emotional	Trail Ride
<a href="#">edit</a>	Participant Two	10/02/2011	No Charge	Sports Therapy	Trail Ride
<a href="#">edit</a>	Participant Ten	10/01/2011	Paid	Sports Therapy	Outdoor Lessons

Page 1 of 3
View 1 - 10 of 23

## Reporting

To create reports based on your entered data, click on the "Reporting" tab and choose the type of information you want (i.e. participants, staff, volunteers, horses, categories, programs or sessions.)



The screenshot shows the "Reporting" tab selected in the top navigation bar. Below it, the "Staff" sub-tab is active. A "Staff List" window is open, displaying a table with columns for First Name, Last Name, Email, and Phone. There are search filters and a "Reset" button at the top of the table. The table contains six rows of staff data.

	First Name	Last Name	Email	Phone
<a href="#">view</a>	Jane	Doe	jane@www.com	123-456-7890
<a href="#">view</a>	Staff	Five	Five@www.com	999-888-7777
<a href="#">view</a>	Staff	Four	Four@www.com	123-456-7890
<a href="#">view</a>	Staff	One	One@www.com	343-434-3434
<a href="#">view</a>	Staff	Seven	Seven@www.com	987-887-9876
<a href="#">view</a>	Staff	Six	Six@www.com	123-123-1231

You can then filter the information to show only what you want. After you have entered a filter, click "submit" to view pie chart summaries. You can change the date range on this page to view data from a different timeframe by clicking "select date range" in the upper right corner.



To create a session report, click on the "sessions" sub-tab under reporting. Enter the filters that you would like to apply to your session data and click "search." Your list of session data will update to include only the sessions you requested via filters. To view or print this report, click on "printable version" in the upper right corner.

[Home](#)
[Sessions](#)
[Reporting](#)
[Setup](#)
[Profile](#)
[Contact](#)
[Help](#)

[Participants](#)
[Staff](#)
[Volunteers](#)
[Horses](#)
[Categories](#)
[Programs](#)
[Sessions](#)

[printable version](#)

**Filters**

from date

to date

(all participants) ▼

(all staff) ▼

(all volunteers) ▼

(all horses) ▼

(all programs) ▼

(all categories) ▼

(all pay status) ▼

Search

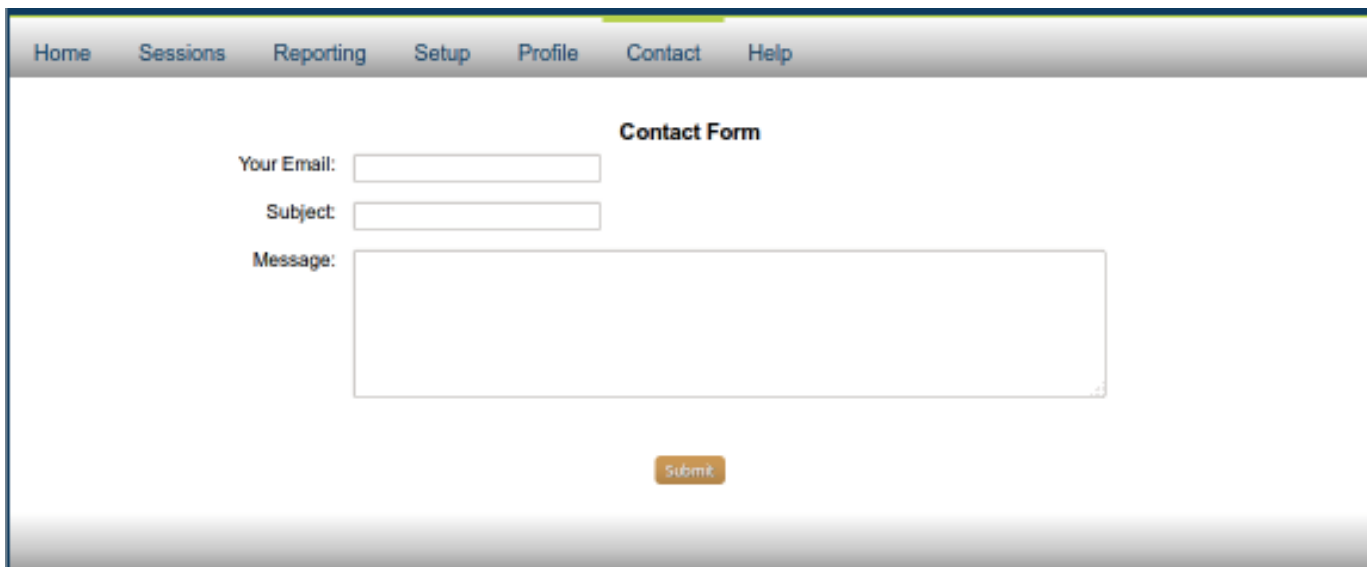
**Session Data**

Date	Participant	Pay Status
<a href="#">Dec. 2, 2011</a>	Participant Nine - Horse7	No Charge
<a href="#">Dec. 2, 2011</a>	Participant Two - Horse 5 Horse1 Horse7	No Charge
<a href="#">Dec. 1, 2011</a>	Participant Four - Horse7	Paid
<a href="#">Nov. 30, 2011</a>	Participant Five - Pony2	Paid
<a href="#">Nov. 29, 2011</a>	Participant Eight - Horse1	Paid
<a href="#">Nov. 28, 2011</a>	Participant Eight - Horse Three	Paid
<a href="#">Nov. 28, 2011</a>	Participant Three - Horse 4	Paid
<a href="#">Nov. 25, 2011</a>	Participant Nine - Pony1	No Charge
<a href="#">Nov. 22, 2011</a>	Participant Eight - Horse 4	Paid
<a href="#">Nov. 8, 2011</a>	Participant One -	Unpaid



## Contact

To submit questions, comments, suggestions, complaints, etc. to the administrators of Equine For Life, click on the "Contact" tab on the top menu bar. Your email address (as recorded on your profile) will automatically be entered in the email address box. Please enter a subject and then type your message in the message box. When finished, click the "submit" button to send it to Equine For Life administration. You may also always email [admin@equineforlife.com](mailto:admin@equineforlife.com). We will make every attempt to respond to all messages and emails with one business day.



The screenshot shows a web application interface with a top navigation bar containing links: Home, Sessions, Reporting, Setup, Profile, Contact, and Help. The 'Contact' link is highlighted with a green underline. Below the navigation bar is a 'Contact Form' section. It includes three input fields: 'Your Email:' (a small text box), 'Subject:' (a small text box), and 'Message:' (a large text area). A 'Submit' button is located at the bottom center of the form area.

Home Sessions Reporting Setup Profile **Contact** Help

**Contact Form**

Your Email:

Subject:

Message:

## Help

Use the "help" tab to look up answers to questions asked frequently by other users. We will continue to update this list of questions as they come. You will also find a copy of the user agreement and user manual on the help page. We encourage you to look up answers and directions on the frequently asked questions page as well as the user manual, but feel free to contact us at any time if you are unable to find the answers you need. We would be more than happy to help you at any time!